

SOUTH PLACER MUNICIPAL UTILITY DISTRICT

STRATEGIC PLAN 2018/2022



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LIST OF ACRONYMS FOUND IN THIS DOCUMENT

CCTV	Closed Circuit Television
CIP	Capital Improvement Program
CMMS	Computerized Maintenance Management System
CWEA	California Water Environment Association
DO	Desired Outcomes
FOG	Fats, Oils & Grease
G&O	Goals and Objectives
GFOA	Government Financial Officers Association
GIS	Geographic Information System
GPS	Global Positioning System
HFLS	High Frequency Lift Station
HRF	High Risk Facilities
IT	Information Technology
KAOF	Key Areas of Focus
KPI	Key Performance Indicators
MOMS	Multiple Operations Management System
MOU	Memorandum of Understanding
PEPRA	Public Employee Pension Reform Act
PLCO	Property Line Clean-Out
SCADA	Supervisory Control & Data Acquisition
SPMUD	South Placer Municipal Utility District (District)
SSMP	Sewer System Management Plan
SSO	Sanitary Sewer Overflow
SSO-ERP	Sanitary Sewer Overflow - Emergency Response Plan
WDR	Waste Discharge Requirements

INTRODUCTION

The South Placer Municipal Utility District's Strategic Plan is a blueprint for the District's response to future challenges and constantly evolving priorities. It reconfirms the District's mission, vision and core values as a customer owned utility, dedicated to protecting public health by providing quality sanitary sewer service that also protects and preserves the water environment and resources for future generations. Under the Board's guidance, "Key Areas of Focus", Goals and Objectives. These objectives recognize the path to be travelled from where the District is now to where the District needs to be.

THE PLANNING PROCESS

The District's first Strategic Plan was developed in 2007 and updated in 2013 and has been used to direct and focus District resources and efforts. This update defines new goals and objectives, and key performance indicators to be carry out in alignment with the District's mission over the next five years.

This comprehensive strategic planning update will augment and guide preparation of an annual budget and establishment of performance processes. The District will continue to use a variety of other planning tools, such as the System Evaluation and Capacity Assurance Plan, System specific Sewer Master Plans, the Five-year Financing Plan, and the Sanitary Sewer Management Plan to guide efforts to meet specific program objectives. The intent of the strategic plan is to bring these diverse planning efforts under a single overarching document that is forward thinking but also builds on the work that we are already doing.

The plan is dynamic; it is intended that the plan will be revisited to reflect changing needs, regulatory compliance and unforeseen future constraints. Performance will be tracked and reported annually to the Board. The feedback received from tracking performance measurements and indicators will be used, as necessary, to modify goals and objectives.

SPMUD Mission

We are a customer owned Utility Dedicated to:

- ⌘ PROTECT public health and the water environment.
- ⌘ PROVIDE efficient and effective sanitary sewer service.
- ⌘ PREPARE for the future.



SPMUD VISION

Our vision is to be a reliable, efficient, innovative operations and maintenance organization that preserves and prolongs the life of our assets, resulting in sustainable, cost-effective customer services.

SPMUD CORE VALUES

INTEGRITY: We will be trustworthy, truthful and honest.

STEWARDSHIP: We will be accountable and committed to responsible management and respect our environment.

SERVICE: We will be responsive, reliable and respectful; putting the needs of the District and customers first.

QUALITY: We will be dedicated to continuous improvement.

PLAN IMPLEMENTATION



This plan provides the District with a vision and overall direction to achieve future success. It does not, however, describe all the specific actions needed to achieve the District’s objectives. These actions are prioritized and spelled out in a series of Work Plans that outline the “SMART” [Specific, Measurable, Achievable, Relevant, Time dependent] tasks for the various objectives contained in the strategic plan. These work plans will be in place and used in the Budget preparation cycle. Utilization of the work plans to guide our budget priorities will ensure that resources are focused on the highest priorities of the District.

Individual employee Performance Plans are currently being prepared to reflect the priorities contained in the work plans, giving the employee, a clear understanding of how their individual work relates to the District.

The Goals and Objectives will be reviewed and updated on an annual basis. The Board of Directors will be provided an annual “Report Card” on the District’s progress of the important tasks amid at achieving the mission.



KEY AREAS OF FOCUS & DESIRED OUTCOMES, GOALS & KEY PERFORMANCE INDICATORS

I. Customer Service:

Provide efficient and effective level of sewer service that meets customer and stakeholder expectations.

Goal 1.1: Engage Customers and stakeholders and promote Public Participation to determine expectations and deliver excellent customer service (combine with 1.5 below)

Objectives

- a) Implement Customer and Stakeholder feedback form and satisfaction survey
- b) Add a “forum” component to the website
- c) Create an interactive learning tool to the website (FOG, roots, building sewer, responsibility, cleanouts, fixtures...)
- d) Investigate an interactive customer-specific tool to the website (billing - Tyler)
- e) Investigate an interactive stakeholder tool to be added to the website (GIS)
- f) Improve web payments site and customer access to their accounts
- g) Focus on building relationships and engage in two-way communication with business partners, title companies, city & county departments as it relates to customer accounts
- h) Develop communication protocol with partner agencies, explore city/town/county portal.

Goal 1.2: Improve Communications

Objectives

- a) Implement Project Outreach Plan
- b) Publish two newsletters annually
- c) Prepare routine press releases of District activity
- d) Develop more comprehensive content for door hangar

- e) Provide employee training (common voice) regarding communication with media/stakeholders/customers

Goal 1.3: Maintain transparency with all District activities

Objectives

- a) Renew Transparency Certification
- b) Obtain GFOA Award for Financial reporting
- c) Post performance measures and annual work plan goals on website
- d) Post link to State Waterboards SSO program
- e) Encourage clear communications with employees to ensure they understand the Districts values and goals

Key Performance Indicators

Amount of Customer dissatisfaction; complaint summary & Customer contact satisfaction rate



II. Sustainability



By taking advantage of opportunities to invest in energy efficiency, renewable energy, water and wastewater management and other sustainable practices to improve the Districts fiscal health and economic prosperity of the residents and businesses that are served by the District.

Goal 2.1: Develop and implement strategies to conserve energy and use it more efficiently.

Objectives

- a) Perform Energy Audits
- b) Investigate Solar for CY Facilities
- c) Explore back-up generation of power for District facilities

Goal 2.2: Implement efforts to ensure water efficiency in District buildings and Operations

Objectives

- a) Perform Water Use Audit
- b) Evaluate Reverse Osmosis Water Treatment Plant for efficiency and continued use
- c) Assess and reduce water use and attributed costs
- d) Irrigate CY grounds with well water
- e) Change CY landscape to drought-resistant, reduce amount of grass
- f) Supplement hydro-cleaning activities with well water
- g) Clean only pipes that need to be cleaned

Goal 2.3: Select, Implement and Integrate strategies to use renewable energy, low carbon fuels, and investigate options for feasibility or alternative fuel-efficient vehicles

Objectives

- a) Perform Fuel Study
- b) Evaluate Fuel alternatives
- c) Hybrid vehicles

Goal 2.4: Embrace Green building policies in the design and operation of District Facilities and enhance sustainable building and construction practices

Objectives

- a) Adopt and Implement Low-Impact-Development Standards
- b) Evaluate use of permeable pavements as a long-term substitute for asphalt paving
- c) Investigate Institute for Sustainable Infrastructure (ISI) Envision process

Goal 2.5: Implement a comprehensive waste reduction and recycling program

Objectives

- a) Enhance current recycling efforts at all District facilities
- b) Establish recycling goals
- c) Continue to pursue a paperless work environment
- d) Procure postconsumer recycled content products
- e) Promote source reduction of office supplies
- f) Enhance used cooking oil pick up program
- g) Enhance e-waste recycling program (household batteries)

Goal 2.6: Provide performance measures and metrics to compare to Best Management Practices.

Objectives

- a) Develop performance measures intended to evaluate sustainability efforts

Key Performance Indicators

Has the District experienced measurable reductions in energy, fuel and water use and waste generation?



III. Infrastructure Management and Capital Improvement

Provide professional, technical, construction and engineering services that ensure the best possible facilities for the District now and in the future.

Goal 3.1: Plan all projects to ensure adherence to District standards and ordinances

Objectives

- a) Create a Quality Control process for SPMUD projects
- b) Create a Quality Control process for Development projects
- c) Create a Quality Control process for County/City/Town projects

Goal 3.2: Provide construction management to ensure the best possible facilities for the District

Objectives

- a) Evaluate work force to ensure appropriate staffing to achieve this goal
- b) Develop a Construction Management Program for District projects

Goal 3.3: Develop and implement a Tactical Asset Management Program

Objectives

- a) Evaluate current asset inventories and management processes
- b) Develop condition assessment/rehab replace program
- c) Prioritize CIP and determine long-term needs
 - a. HRF, HFLS
 - b. Lift Station Abandonment Schedule

Goal 3.4: Provide performance measures and metrics to compare to Best Management Practices

Key Performance Indicators

Through an Annual review process, are District projects and process performing as designed and intended?



IV. Sewer System Maintenance and Watershed Management

Maintain and improve the District's infrastructure in a cost-effective manner to ensure delivery of reliable, high quality service now and in the future. Meet or surpass water quality, environmental, regulatory and public health standards, while maintaining the public trust.

Goal 4.1: Maintain Compliance with pertinent regulations

Objectives

- a) Use consultants to establish a regulatory compliance program
- b) Attend/participate in industry workshops and conferences
- c) Participate in the State Water Boards SSO reduction programs
- d) Continuously evaluate the District's OERP
- e) Investigate Regional Partners Regulatory Compliance Program

Goal 4.2: Prevent and Mitigate Sewer System Overflows (SSOs) using the most efficient and effective maintenance and operational methods and procedures.

Objectives

- a) CCTV the mainline system in a four-year interval
- b) Perform condition assessment of 1600 laterals/year
- c) Clean all lines identified by CCTV operations to be cleaned
- d) Eliminate causes for repeat customer service calls
- e) Ensure cleanouts on all District owned Lower Laterals

Goal 4.3: Implement the FSE FOG permit system.

Objectives

- a) Permit all FSE's
- b) Inspect all FSE's on an appropriate schedule

Goal 4.4: Provide performance measures and metrics to compare to Industry Best Management Practices

Key Performance Indicators

Are we in compliance with all Federal, State and Local regulatory requirements?

Have we met all established performance goals?

V. Financial Stability

Manage the District's finances to support district needs and maintain reasonable wastewater rates.

Goal 5.1: Maintain Wastewater rates sufficient to meet financial needs, operational demands, regulatory requirements and customer expectations

Objectives

- a) 5-Year Financial Plan Updates
- b) Establish predictable rates
- c) Recover sufficient revenues to maintain wastewater operations, capital and regulatory requirements

Goal 5.2: Explore and evaluate investment and business practice alternatives

Objectives

- a) Periodically review Board Investment and Reserve policies and permitted investment allocations

Goal 5.3: Maintain financial responsibility by ensuring allocated funding sources are adequate to meet expenses; and that available funds and resources are managed efficiently.

Objectives

- b) Evaluate investments and monitor liquidity needs

Goal 5.4: Prepare balanced annual budgets; conduct acceptable audits

Objectives

- a) Obtain GFOA Award
- b) Conduct Annual Audit

Goal 5.5: Provide qualifying low-income program rates for eligible customers

Objectives

- a) Implement Lifeline Low Income Rate Assistance Program

Goal 5.6: Provide routine reports on Financial Stability

Objectives

- a) Monthly and annual reporting of investments and expenditures
- b) Annual report to the Board from the investment team

Goal 5.7: Provide performance measures and metrics to compare to Industry Best Management Practices

Key Performance Indicators

Are wastewater rates sufficient to support district needs?

Are wastewater rates comparable to surrounding sanitary sewer agencies?



VI. Workforce Planning and Employee Development

Provide a collaborative team-oriented workforce that is fully trained, compensated, and accountable with clearly defined career paths for the evolving work environment

Goal 6.1: Enhance Professional Development and Training Programs to invest in District employees

Objectives

- a) Bring experts to the District for in-house training (Departmental specific and advanced word processing, spreadsheets etc.)
- b) Field staff attend CWEA training
- c) Investigate a regional partners training program
- d) Enhanced incentives for professional development
- e) Evaluate core/non-core duties for performance by contracted services/consultants

Goal 6.2: Develop and implement competitive and Incentive-based Compensation Programs

Objectives

- a) Implement Performance Based Compensation Program (West Bay Model)
- b) Implement Performance Based Wellness program

Goal 6.3: Continuously evaluate the organizational staffing needs for the District

Objectives

- a) Investigate staffing triggers
- b) Investigate the concept of staffing models and determine cost benefit analysis
- c) Use of Consultants; evaluate outsourcing of non-core functions
- d) Safety Regulatory Compliance Officer
- e) Develop Performance Standards by Job Classification

Goal 6.4: Provide performance measures and metrics to compare to Industry Best Management Practices

Key Performance Indicators

Are District employees performing as required by Performance Plans?

Have we had voluntary participation in the Employee Training Programs?

VII. Operational Optimization

Improve functions that support the District's administrative, financial, technical, and field activities and provide the best service to the customer.

Goal 7.1: Information Technology
Improve the various data management and information systems

Objectives

- a) Continuously evaluate available technology to ensure efficient programs and processes
- b) Implement technology based upon District needs



Goal 7.2: Develop and implement Records Management Plan

Objectives

- a) Implement Records Retention Policy
- b) Inventory Old Agreements, Establish intention and history, document (use of GIS) and train staff accordingly (refund agreements, assessment districts, pre-paid agreements/credits)
- c) Manage Archiving Systems
- d) Develop Standard documentation procedures/electronic filing protocols, file naming etc.

Goal 7.3: Business Efficiencies

Objectives

- a) Implement Fuel Station Card-Lock (done)
- b) Increase the number of customers using the web site to manage their customer accounts and make web payments
- c) Evaluate need for contracted services/consultants for core/non-core tasks

Key Performance Indicators

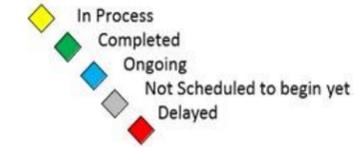
Has the District explored and exploited all opportunities to utilize technology in making District processes more efficient?

**SOUTH PLACER MUNICIPAL UTILITY DISTRICT
STRATEGIC PLAN - FY 17/18 - 21/22**



Objectives	FY 17/18				FY 18/19				FY 19/20				FY 20/21				FY 21/22			
	July-Sept 2017	Oct-Dec 2017	Jan-Mar 2018	Apr-June 2018	July-Sept 2018	Oct-Dec 2018	Jan-Mar 2019	Apr-June 2019	July-Sept 2019	Oct-Dec 2019	Jan-Mar 2020	Apr-June 2020	July-Sept 2020	Oct-Dec 2020	Jan-Mar 2021	Apr-June 2021	July-Sept 2021	Oct-Dec 2021	Jan-Mar 2022	Apr-June 2022
I. Customer Service:																				
Goal 1.1: Engage Customers and stakeholders and promote Public Participation to determine expectations and deliver excellent customer service																				
Goal 1.1 a	Implement Customer and Stakeholder Feedback Form and Satisfaction survey		x	Implement																
Goal 1.1 b	Add a "Forum" component to the District Website	x	x	Implement																
Goal 1.1 c	Create an interactive learning tool to the website (FOG, roots, building sewer, responsibility, cleanouts, fixtures...)					x	x	Implement	Implement											
Goal 1.1 d	Investigate an interactive customer-specific tool to the website (billing)									x	x	x	x	Implement						
Goal 1.1 e	Investigate an interactive stakeholder tool to be added to the website (GIS)		Develop	Develop	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Goal 1.1 f	Improve web payments site and customer access to their accounts		x	x	Implement															
Goal 1.1 g	Focus on building relationships and engage in two-way communication with business partners, title companies, city & county departments as it relates to customer accounts.	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Goal 1.1 h	Develop communication protocol with partner agencies – city/town/county portal							Develop	Develop	x	x	x	x	x	x	x	x	x	x	x
Goal 1.2: Improve Communications																				
Goal 1.2 a	Implement Project Outreach Plan	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Goal 1.2 b	Publish two newsletters annually		x		x		x		x		x		x		x		x		x	
Goal 1.2 c	Prepare routine press releases of District activities	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Goal 1.2 d	Develop comprehensive content for door hangar				Develop	Develop														
Goal 1.2 e	Provide employee training (common voice) regarding communication with media/stakeholder/customers.		x				x				x			x			x			
Goal 1.3: Transparency with all District Activities																				
Goal 1.3 a	Renew Transparency Certification					Prepare	Prepare	Send	Cert.								Prepare	Prepare	Send	Cert.
Goal 1.3 b	Obtain GFOA Award for Financial Reporting	Prepare	Send			Prepare	Send			Prepare	Send			Prepare	Send		Prepare	Send		
Goal 1.3 c	Post performance measures and annual work plan goals on website			x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Goal 1.3 d	Post link to State Waterboards SSO program	Complete																		
Goal 1.3 e	Encourage clear communications with employees to ensure they understand the Districts values and goals.		x				x				x			x			x			

SOUTH PLACER MUNICIPAL UTILITY DISTRICT
STRATEGIC PLAN - FY 17/18 - 21/22



Objectives	FY 17/18				FY 18/19				FY 19/20				FY 20/21				FY 21/22			
	July-Sept 2017	Oct-Dec 2017	Jan-Mar 2018	Apr-June 2018	July-Sept 2018	Oct-Dec 2018	Jan-Mar 2019	Apr-June 2019	July-Sept 2019	Oct-Dec 2019	Jan-Mar 2020	Apr-June 2020	July-Sept 2020	Oct-Dec 2020	Jan-Mar 2021	Apr-June 2021	July-Sept 2021	Oct-Dec 2021	Jan-Mar 2022	Apr-June 2022
II. Sustainability																				
Goal 2.1: Develop and implement strategies to conserve energy and use it more efficiently																				
Goal 2.1 a	Perform Energy Audits					X	Complete													
Goal 2.1 b	Solar at CY Facilities						X	X	Complete											
Goal 2.1 c	Explore back-up generation of power for District facilities			X	X	Complete														
Goal 2.2: Implement efforts to ensure water efficiency in District buildings and Operations																				
Goal 2.2 a	Perform Water Use Audit							X	Complete											
Goal 2.2 b	Evaluate Reverse Osmosis Water Treatment Plant for efficiency and continued use							X	Complete											
Goal 2.2 c	Assess and reduce water use and attributed costs								X	Complete										
Goal 2.2 d	Irrigate CY grounds with well water		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Goal 2.2 e	Change CY landscape to drought-resistant, reduce amount of grass				X	Complete														
Goal 2.2 f	Supplement hydro-cleaning activities with well water		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Goal 2.2 g	Clean only pipes that need to be cleaned		X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Goal 2.3: Select, Implement and Integrate strategies to use renewable energy, low carbon fuels, and investigate options for feasibility or alternative fuel efficient vehicles																				
Goal 2.3 a	Perform Fuel Study	Complete																		
Goal 2.3 b	Evaluate Fuel Alternatives											X	Complete							
Goal 2.3 c	Hybrid Vehicles											X	Complete							
Goal 2.4: Embrace Green building policies in the design and operation of District Facilities and enhance sustainable building and construction practices																				
Goal 2.4 a	Adopt and Implement Low-Impact-Development Standards																		Research	Implement
Goal 2.4 b	Evaluate use of permeable pavements as a long term substitute for asphalt paving														Evaluate	Evaluate				
Goal 2.4 c	Investigate Institute for Sustainable Infrastructure (ISI) Envision process														Research	Research				
Goal 2.5: Implement a comprehensive waste reduction and recycling program																				
Goal 2.5 a	Enhance current recycling efforts at all District facilities.			X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Goal 2.5 b	Establish recycling goals.			X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Goal 2.5 c	Continue to pursue a paperless work environment.	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Goal 2.5 d	Procure postconsumer recycled content products.	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Goal 2.5 e	Promote source reduction of office supplies.	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Goal 2.5 f	Enhance used cooking oil pick up program							Research	Implement											
Goal 2.5 g	Enhance e-waste recycling program (household batteries)																X	Complete		
Goal 2.5 h	Enhance website information regarding oil recycling																			
Goal 2.6: Provide performance measures and metrics to compare to Best Management Practices.																				
Goal 2.6 a	Develop performance measures intended to evaluate sustainability efforts.	X	X	X	X	Implement														

**SOUTH PLACER MUNICIPAL UTILITY DISTRICT
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Objectives		FY 17/18				FY 18/19				FY 19/20				FY 20/21				FY 21/22			
		July-Sept 2017	Oct-Dec 2017	Jan-Mar 2018	Apr-June 2018	July-Sept 2018	Oct-Dec 2018	Jan-Mar 2019	Apr-June 2019	July-Sept 2019	Oct-Dec 2019	Jan-Mar 2020	Apr-June 2020	July-Sept 2020	Oct-Dec 2020	Jan-Mar 2021	Apr-June 2021	July-Sept 2021	Oct-Dec 2021	Jan-Mar 2022	Apr-June 2022
III. Infrastructure Management and Capital Improvement																					
Goal 3.1: Plan all projects to ensure adherence to District standards and ordinances																					
Goal 3.1 a	Create a Quality Control process for SPMUD projects									Develop	Develop										
Goal 3.1 b	Create a Quality Control process for Development projects									Develop	Develop										
Goal 3.1 c	Create a Quality Control process for County/City/Town projects									Develop	Develop										
Goal 3.2: Provide construction management to ensure the best possible facilities for the District																					
Goal 3.2 a	Construction management to ensure the best possible facilities for the District - Evaluate work force to ensure appropriate staffing to achieve this goal									Evaluate	Evaluate										
Goal 3.2 b	Develop a Construction Management Program for District projects									Develop	Develop										
Goal 3.3: Develop and implement a Tactical Asset Management Program																					
Goal 3.3 a	Evaluate current asset inventories and management practices			Evaluate						Evaluate										Evaluate	
Goal 3.3 b	Develop condition assessment/rehab replace program			Develop						Implement										Implement	
Goal 3.3 c	Prioritize CIP and determine long-term needs:									Develop	Assess									Assess	
Goal 3.4: Provide performance measures and metrics to compare to Best Management Practices																					

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Objectives	FY 17/18				FY 18/19				FY 19/20				FY 20/21				FY 21/22			
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IV. Sewer System Maintenance and Watershed Management																				
Goal 4.1: Maintain Compliance with pertinent regulations																				
Goal 4.1 a				X	X	X	Complete													
Goal 4.1 b			X				X				X				X				X	
Goal 4.1 c			X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Goal 4.1 d	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Goal 4.1 e						X	Complete													
Goal 4.1 f					X	X														
Goal 4.2: Prevent and Mitigate Sewer System Overflows (SSOs) using the most efficient and effective maintenance and operational methods and procedures.																				
Goal 4.2 a	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Goal 4.2 b	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Goal 4.2 c	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Goal 4.2 d	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Goal 4.2 e	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Goal 4.3: Implement the FSE FOG permit system.																				
Goal 4.3 a	Permit	Permit	Permit	Permit	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x	x
Goal 4.3 b			Inspect	Inspect		Inspect	Inspect	Inspect												
Goal 4.4: Provide performance measures and metrics to compare to Best Management Practices																				

**SOUTH PLACER MUNICIPAL UTILITY DISTRICT
STRATEGIC PLAN - FY 17/18 - 21/22**



Objectives	FY 17/18				FY 18/19				FY 19/20				FY 20/21				FY 21/22			
	July-Sept 2017	Oct-Dec 2017	Jan-Mar 2018	Apr-June 2018	July-Sept 2018	Oct-Dec 2018	Jan-Mar 2019	Apr-June 2019	July-Sept 2019	Oct-Dec 2019	Jan-Mar 2020	Apr-June 2020	July-Sept 2020	Oct-Dec 2020	Jan-Mar 2021	Apr-June 2021	July-Sept 2021	Oct-Dec 2021	Jan-Mar 2022	Apr-June 2022
V. Financial Stability																				
Goal 5.1: Maintain Wastewater rates sufficient to meet financial needs, operational demands, regulatory requirements and customer expectations																				
Goal 5.1 a	5- Year Financial plan updates																			
Goal 5.1 b	Establish predictable rates																			
Goal 5.1 c	Recover sufficient revenues to maintain wastewater operations, capital and regulatory requirements.																			
Goal 5.2: Explore and evaluate investment and business practice alternatives																				
Goal 5.2 a	Periodically review Board Investment and Reserve policies and permitted investment																			
Goal 5.3: Maintain financial responsibility by ensuring allocated funding sources are adequate to meet expenses; and that available funds and resources are managed efficiently.																				
Goal 5.3 a	Evaluate investments and monitor liquidity needs.																			
Goal 5.4: Prepare balanced annual budgets; conduct acceptable audits																				
Goal 5.4 a	Obtain GFOA Award for Financial Reporting																			
Goal 5.4 b	Conduct Annual Audit																			
Goal 5.5: Provide qualifying low income program rates for eligible customers																				
Goal 5.5 a	Investigate the mplementation of a Lifeline Low income Rate Assistance Program.																			
Goal 5.6: Provide routine reports on Financial Stability																				
Goal 5.6 a	Monthly and annual reporting of investments and expenditures.																			
Goal 5.6 b	Annual report to the Board from the investment team.																			
Goal 5.7: Provide performance measures and metrics to compare to Best Management Practices																				
Goal 5.7:	Provide Performance Measures and metrics to compare to Best Management Practices																			